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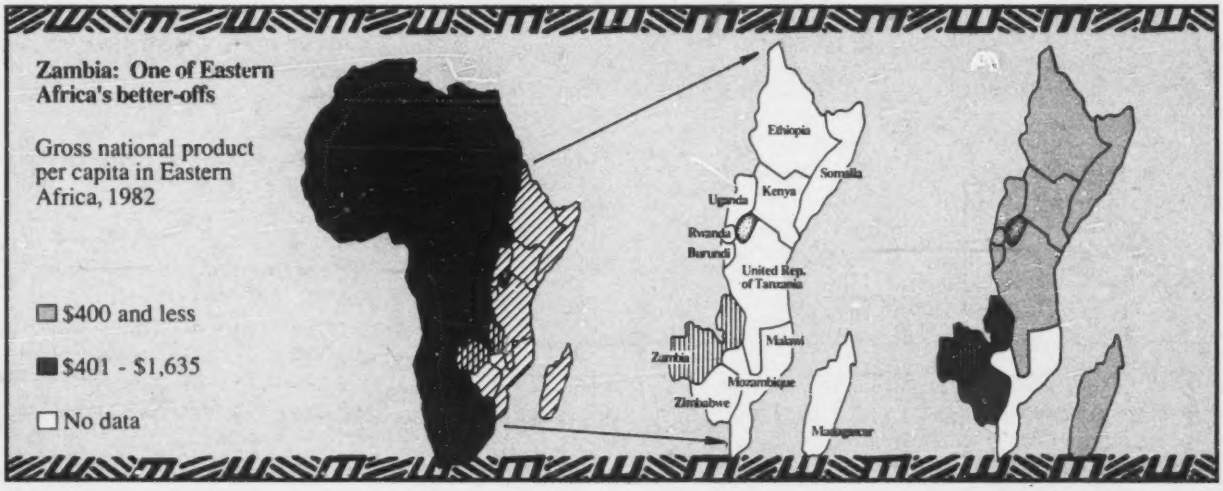
CONSUMER TRENDS AND MARKETS ABROAD
MAY 1986 VOLUME 5, NUMBER 5

# International Demographics




COUNTRY PROFILE

## The Republic of Zambia

At independence in 1964--a year after the dissolution of the British colonial federation formerly made up of Northern Rhodesia (today's Zambia), Southern Rhodesia (today's Zimbabwe), and Nyassaland (today's Malawi)-- Zambia's economic future looked brighter than that of most other developing countries. Its copper production accounted for 8 percent of total world production--making it the world's fifth largest producer. In addition, only neighboring Zaire outpaced it in the production of cobalt. Its Central Province around Kabwe (Broken Hill) held rich deposits of both zinc and lead; uranium deposits also had been found, but their projected yield remained undetermined.

But since 1974, the decline in the price of copper and the increase in the price of oil--Zambia's major import--have played havoc with Zambia's balance of payments. Copper, which accounted for 40 percent of the GNP and 98 percent of all foreign exchange in 1964, shrank to 12 percent of the GNP in 1978 while still generating most of the foreign exchange. As a result, imports were cut back drastically from $1.5 billion in 1973 to $690 million in 1983.

Although this trend is beginning to make a U-turn, with oil prices dropping and copper prices rising, Zambia's economic situation remains grave. In 1984, the GNP continued registering negative growth (-1.3 percent), inflation stood at 25 percent, and the *kwacha*, the already besieged national currency, was further devalued.

Zambia's major trading partners--Great Britain, the United States, Japan, Saudi Arabia, South Africa, Italy, and West Germany--together bought $866 million of minerals, tobacco, peanuts, and corn in 1983. Trade with the U.S. fluctuates widely, oscillating around imports of about $120 million and exports of about $80 million annually.

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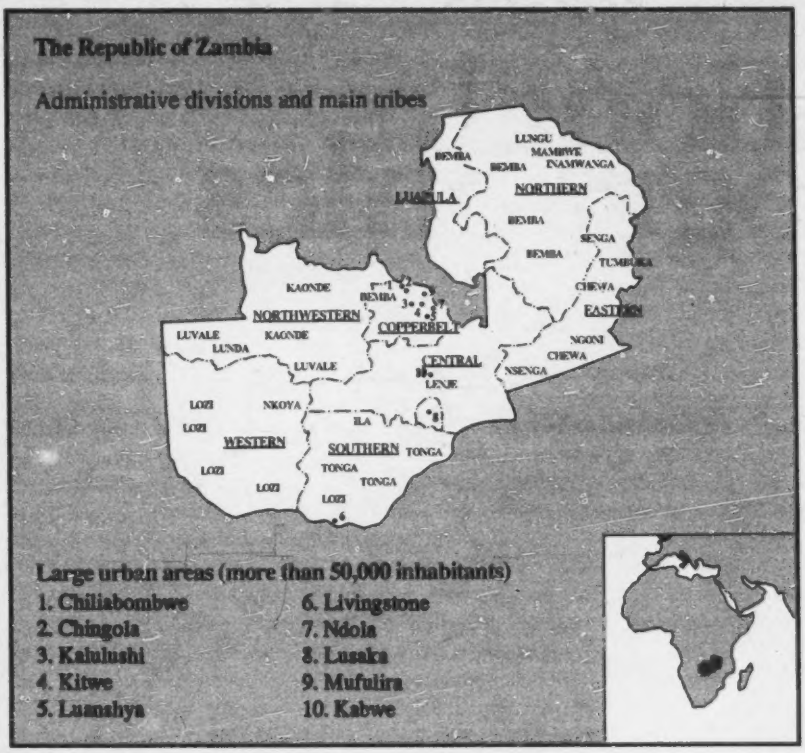
INSIDE

"New"qualitative research in Europe ....4
Regions: West Germany, Italy, Turkey....10
Publications....11
Gray Australians....12

THIS MONTH: ZAMBIA




## ZAMBIAN HUMANISM

Despite an unsuccessful coup in October, 1980, Zambia's government is one of the most stable in the region. Since independence, the United National Independence Party (UNIP), under the leadership of President Kenneth Kaunda (last reelected in 1983), has governed Zambia. Kaunda has tried to reduce the influence of tribal law through a highly personal brand of socialism, called Zambian Humanism.

One motto of Zambia's version of African socialism calls on the economy to serve man, not vice versa. In accordance with this ideal, the Mulungushi Reform of 1968 placed 51 percent of the shares of Zambia's 26 largest companies under government control. Unfortunately, government interference in the economy did not always prove beneficial, and a more pragmatic economic policy placing more emphasis on the private sector and greater receptiveness to foreign investment was instituted in 1977 with the passing of the Industrial Development Act.

The 1972 Constitution declared Zambia a one-party nation. The president serves a 5-year term. Parliamentary representation rests with the 135-member National Assembly, although actual political power is wielded by the 25-member Central Committee of the UNIP.

## CITIES AND REGIONS

With its 290,586 square miles, Zambia is slightly larger than the combined area of Nebraska, Kansas, Iowa, and Missouri. Zambia's terrain is mostly sloping plateau with altitudes varying between 3,000 and 5,000 feet. Cattle-raising country in the south is rather dry, whereas the north and northwest receive more rain. The best agricultural land lies in the central portion of the country, also home to Zambia's major cities.

Administratively, the country is divided into 9 provinces, which are further divided into 57 districts. Each province is administered by one member of the Central Committee of the UNIP. Districts are headed by district governors appointed by the president.

The largest city and the nation's capital, Lusaka, lies in Lusaka Province, bounded on three sides by the southern border of Central Province. Lusaka Province is home to nearly 700,000 people, of which slightly over half a million live in Lusaka City. The planned community of Kafue with a total population of 29,794 people lies slightly south of the capital and is the only city in the area founded after independence.

While Lusaka acts as the country's administrative center, Zambia's economic and demographic hub lies further north in Copperbelt Province. Home to 1.25 million Zambians, or nearly 22 percent of the total population, Copperbelt Province is Zambia's most populous province. Seven of ten cities with more than 50,000 inhabitants are located in Copperbelt Province. The city of Kitwe houses 314,794 Zambians; Ndola, 282,439; Chingola, 145,869; Mufulira, 149,778; Luanshya, 132,164; Chililabombwe, 61,928; and Kalulushi, 59,213. The only other cities of any importance are Kabwe, also called Broken Hill, the capital of Central Province, with a total population of 143,635 people and Livingstone, the capital of Southern Province (total population, 71,987), located near the Zambezi River's famous Victoria Falls.

All of these cities lie along the "old line of rail," which runs from Lobito, Angola north to Lumumbashi, Zaire, turns southeast and continues on to the Copperbelt cities, Lusaka, and Livingstone, and

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travels further south into Zimbabwe to its final stop in the port of Beira, Mozambique.

With its urbanization rate doubling from 21 percent in 1964 to 43 percent in 1985, Zambia is now the most urbanized country south of the Sahara. Copperbelt Province and Lusaka Province are the most urbanized provinces. They house 34 percent of Zambia's total population and account for nearly 71 percent of its urbanized population. Ninety-two percent of all Zambians in Copperbelt Province live in urban areas.

The remaining provinces are predominantly rural--only eight towns have more than 10,000 inhabitants--with 85 percent of their population living in the countryside. Eastern Province is Zambia's largest agricultural region. Its capital, Chipata (also called Fort Jameson), has a total population of 32,291. The low Muchinga mountains separate Eastern Province from Northern Province (capital, Kasama; population, 38,093) and the very poor Luapula Province (capital, Mansa; population, 34,801). The most sparsely populated areas are Northwestern Province (capital, Zambezi; population 8,166) and Western or Barotse Province (capital, Mongu; population, 24,919).

## POPULATION AND GROWTH

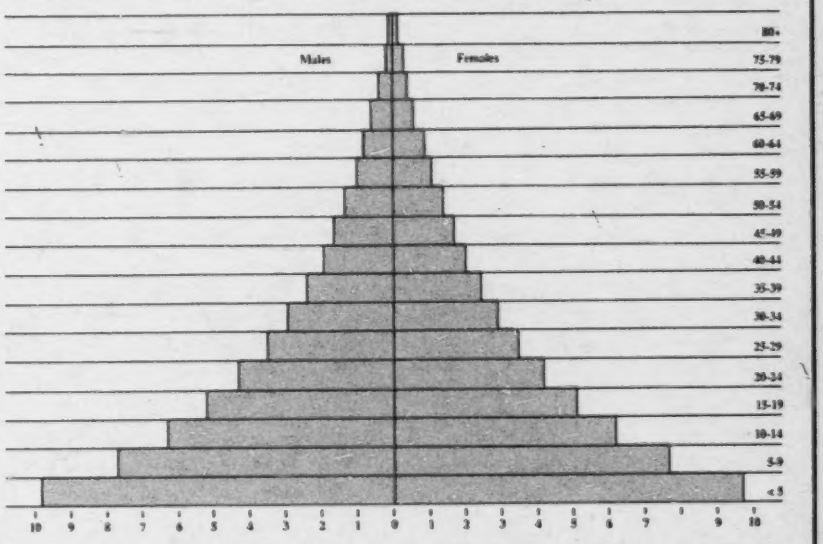
Zambia's 1985 population is estimated to be 6.8 million. The1980 census counted 5.68 million, up from 3.49 million in 1963, and 4.06 million in 1969. Between 1963 and 1969, the average annual population growth rate was 2.5 percent; between 1969 and 1980, 3.1 percent. Although high when compared to other developing countries, Zambia's population growth rate is in line with those of other East African countries. Kenya, Rwanda, Tanzania, Sudan, and Zimbabwe all have annual growth rates of over 3 percent. Zambia's population growth rate is expected to continue to climb, peaking at 3.5 percent in the year 2000 at which time Zambia is expected to have 11.2 million inhabitants.

The current birthrate of about 48 per 1,000 is expected to decline only marginally in the next 15 years, but the death rate is declining more rapidly: from 19 per 1,000 in the late 1960s to 15 per 1,000 in 1985. Concomitantly, life expectancy is expected to rise from the current 51 years to about 58 years. The total fertility rate (the mean number of children a woman will have borne by the end of her reproductive period) should diminish little, from 6.9 to 6.5 by the year 2000. Infant mortality, currently hovering around 100 deaths to infants under one year of age per 1,000 live births, could decline to 75 by the year 2000.

International migration is not an important factor in Zambia's population balance. The annual number of immigrants to Zambia is usually fewer than 4,000. Temporary visitors are of more importance, numbering between 100,000 and 150,000 in any given year. Immigrants come mainly from the United Kingdom, Asia, and other European and African nations. Visitors are predominantly from Zimbabwe, Zaire, Malawi, and Tanzania.

The province of Lusaka, which maintained an average annual growth rate of 6.3 percent between 1969 and 1980, is Zambia's most rapidly growing industrial area. The capital of Lusaka grew at a rapid annual rate of 6.8 percent, although slower than the 13.4 percent average annual growth rate registered between 1963

Zambia: estimated total population by age and sex, 1985




| Age | Total | Males | Females |
|---|---|---|---|
| All Ages | 6,664,000 | 3,312,000 | 3,352,000 |
| 0-4 | 1,294,000 | 650,000 | 644,000 |
| 5-9 | 1,022,000 | 512,000 | 510,000 |
| 10-14 | 839,000 | 423,000 | 416,000 |
| 15-19 | 688,000 | 346,000 | 342,000 |
| 20-24 | 567,000 | 284,000 | 283,000 |
| 25-29 | 466,000 | 232,000 | 234,000 |
| 30-34 | 381,000 | 189,000 | 192,000 |
| 35-39 | 318,000 | 158,000 | 160,000 |
| 40-44 | 263,000 | 129,000 | 134,000 |
| 45-49 | 218,000 | 106,000 | 112,000 |
| 50-54 | 178,000 | 85,000 | 93,000 |
| 55-59 | 142,000 | 67,000 | 75,000 |
| 60-64 | 110,000 | 51,000 | 59,000 |
| 65-69 | 80,000 | 37,000 | 43,000 |
| 70-74 | 53,000 | 24,000 | 29,000 |
| 75-79 | 30,000 | 13,000 | 17,000 |
| 80+ | 15,000 | 6,000 | 9,000 |

*Source: United Nations, World Population Prospects: Estimates and Projections as Assessed in 1982.*

## INSIDE INFORMATION

### "New" Qualitative Research in Europe

It's boom times for qualitative research on consumer behavior, according to European researchers speaking at the European Society for Opinion and Marketing Research (ESOMAR) qualitative research seminar held in Amsterdam in February.

Granted, developments in qualitative research are not as spectacular and conspicuous as those in quantitative research--where innovation is mostly caused and accelerated by technological developments in data collection, processing, and analysis--but "new" qualitative methods are certainly in demand. In the United Kingdom alone, 30 million pounds or over 20 percent of all United Kingdom research spending is allotted annually to qualitative research into consumer behavior, according to Stephen Wells, managing director of The Consumer Connection, Ltd., and Tony Lunn, managing director of Advanced Behavioral Research, Ltd.

Britain's boom in qualitative research, they noted, has continued unabated since the early 1970s because broad changes in the economy such as public spending cuts and the retail sector overtaking manufacturing in importance "have fueled a need for research which is economical and quick and flexible to conduct. And which crucially gives answers."

So what's "new" about the "new qualitative research?" According to seminar convener Jetty Plasschaert, managing director of Holland's Intomart Qualitatief B.V., qualitative research on consumer behavior has always relied heavily on psychology and reflects the moving focus of attention in psychology. In the '50s, the focus was on the emotional and subconscious or unconscious processes within the individual, strongly anchored in early childhood and the small circle of family life. Later on, after a period of seeing the individual as mainly determined by the stimuli in his environment and conditioned through learning processes, the focus shifted to cognitive processes.

But now, as in psychology, many in market research are involved in a noncognitive revolution, shifting the focus back to the emotions and the unconscious.

According to Judie Lannon, research director at the London office of J. Walter Thompson Advertising Agency, the new qualitative research, by helping to improve advertising creativity, or aesthetics, has given British advertising a high appreciation rate--54 percent in a June 1984 survey "liked" or "quite liked" TV commercials and only 16 percent disapproved of them.

Other developments in qualitative research as a tool in marketing decision-making were discussed at the ESOMAR conference. The first session dealt with the new qualitative research--its basis, practice, perspectives, and limitations. Other sessions presented fascinating case studies where qualitative research methods were used to solve intriguing marketing problems. Texts of speeches given at the ESOMAR conference are available in a book of seminar proceedings from: ESOMAR, J.J. Viottastraat 29, 1071 JP Amsterdam (The Netherlands); telephone (020) 64.21.41: telex: 18535. •

and 1969. This slowdown reflects the trend begun in the mid-1970s of decreasing migration to principal urban centers as a result of sluggish industrial growth. The government's decentralization policy contributed little to this trend; even today, industry is concentrated along the "old line of rail."

Kabwe is Zambia's most rapidly growing city registering an average annual growth rate of 7.3 percent between 1969 and 1980. Ndola and Kalulushi also are growing quickly. Growth in Chingola and Kitwe, which averaged over 8 percent annually between 1963 and 1968, has slowed somewhat in recent years.

Western Province, Luapula Province, and Northern Province bring up the rear with relatively slow growth rates. The latter two registered net population losses during the 1960s due to out-migration to Lusaka and the Copperbelt. This trend has abated somewhat, and, assisted by comparatively high fertility rates, growth rates have returned to positive levels of about 2 percent. Western Province and Northwestern Province also lost population due to out-migration, but their slow growth rates are largely due to lower than average birthrates. The only district in these two provinces registering an average annual negative growth rate between 1969 and 1980 was the Zambezi District (-0.5 percent).

#### HOUSEHOLDS AND FAMILIES

As a result of the high growth rate, Zambia's population is young, with a median age of about 16.3 years. By the year 2000, the median age is expected to decline to 16 years.

Zambians under age 15 make up a whopping 47 percent of the total population; in contrast, those over age 65 make up only 2.7 percent of the total population. Therefore, Zambia's dependency ratio (the ratio of the economically dependent to the productive--those in the working ages of 15-64) is nearly one-to-one.

Traditional African values stress the importance of large families. Zambia's total fertility rate was 6.9 in 1985. According to the World Bank, only 1 percent of married women of childbearing age in 1982 used contraceptives.

However, a survey conducted in Lusaka in 1970 found urban women slightly more receptive to birth control, although still largely adhering to traditional values. Very few of the Lusaka women surveyed preferred fewer than 6 children. Only 13 percent of the women surveyed had some knowledge of family planning methods, only 11 percent approved of establishing family planning clinics, and a mere 3 percent actually used contraceptives. Family planning fared better among the upper classes, however. Fifty-two percent had some knowledge of family planning methods, 34 percent accepted establishing family planning clinics, and 28 percent were practicing some form of birth control. Yet, even among these groups, a minority preferred fewer than 5 children.

Zambia's low population density (7.5 people per square kilometer) has encouraged a pro-natalist attitude among government officials, although birth spacing has been recognized as a legitimate health measure. However, the lean economic years following the 1973 oil crisis have made government planners more receptive to

deliberately reducing the birthrate.

Mean ages at first marriage were substantially lower for women than for men (18.4 and 24.4 respectively) in 1969. In 1985, 37 percent of women aged 15-19 were married. Only Asian women or those with more than 10 years of education tend to marry after their 20th birthdays. Polygamy, although officially outlawed, is practiced in about 5 percent of Zambian households. Most urban households are made up of nuclear families.

Marriage may be a given in Zambia, but divorce too has its place. Tribal customs often butt heads with city ways, especially when government policy reflects life in town rather than in the bush. Zambia's high divorce rate, especially in urban areas, is often in part blamed on the government disregarding the old tribal ways. Zambia's tribal groups, for example, are mostly matriarchal. After marriage, the husband moves in with his parents-in-law, while at the same time maintaining authority over his sister's children. His own children fall under the authority of their maternal uncle who lives away with his in-laws. The government, however, assumes that the lines of responsibility fall under Western nuclear-family traditions for families living in the cities. Such disruptions cause family tensions that lead to divorce.

Another cause of social instability is the migration of men to the cities, common since colonial times, for work in the mines. The male head of the family often works in the city, while his wife works in the fields and cares for the children hundreds of miles away. Principal in-migration areas--Central, Copperbelt, and Lusaka Provinces--tend therefore to have more men in the population than women, and the major out-migration areas--Eastern, Luapula, Northern, Northwestern, and Western Provinces--more women than men. The Copperbelt cities, especially Kitwe, Luanshya, and Ndola, have a particularly large male population. Migration, however, has abated somewhat in recent years, lessening the sharp imbalance registered in 1969 when males outnumbered females in both Copperbelt and Lusaka Provinces by nearly a two-to-one margin.

## HOUSING AND CONSTRUCTION

Traditional villages in Zambia differ for each tribe. Generally, villages are made up of clusters of rectangular houses with no strict division in compounds for each polygamous family, as is usual in West Africa. Housing data are hard to get. The latest nationwide survey--the 1969 census--estimated the total housing stock at 879,000. About 65 percent of the rural dwellings are built of local materials like sun-dried mud bricks or a grid of poles filled with *dagga* , a mixture of soil and natural materials.

The current number of urban homes is estimated at almost half a million. Ninety percent are built of such materials as bricks and concrete. In the 1974 sample census, 11 percent of urban homes, which accounted for 73 percent of all housing investments, were considered "high or medium cost"; 47 percent were "low cost." Thirty-seven percent were company housing units located along the "old line of rail." About 7 percent were constructed according to "site and service" schemes, in which only the land and basic infrastructure are provided to the occupant. The remaining 35 percent of urban housing stock consisted of servants' quarters and squatter settlements, which were legalized in 1975.

By 1984, squatter settlements represented an estimated 40 percent of all urban housing--over 50 percent in Lusaka City--and made up 60 percent of all newly constructed homes. In 1969, 73 percent of urban dwellings were considered overcrowded.

COMPARATIVELY SPEAKING

***Zambia is the third most urbanized country in mainland black Africa, with 41 percent of its 1980 population living in towns of more than 5,000 inhabitants.***

Illustration by Dana Sosna

COMPARATIVELY SPEAKING

Only 10 percent had more than three rooms. The average occupancy in 1974 amounted to 2.5 persons per room, or 6 per dwelling, varying from a low in Kafue City of just over 4 persons per dwelling to a high of nearly 8 per dwelling in Livingstone City. Current estimates show even higher figures.

Most rural dwellings (70 percent) use grass or thatch for roofing, while 50 percent of urban dwellings use asbestos and 33 percent corrugated iron. Grass or thatch, although requiring periodic replacement, keep dwellings reasonably cool. In 1974, half of urban and 4 percent of rural homes had running water. If shared water taps are included, these percentages rise to 82 percent of urban and 13 percent of rural homes. Access to electricity was limited to 41 percent of urban and 3 percent of rural dwellings.

## ETHNICITY AND RELIGION

Although tribal links are weakening, Zambia still counts 73 officially

**Administrative divisions of Zambia: populations, urbanization rates, population densities, and annual growth rates**

| Provinces | Population in 1980 | Urbanization Rate in 1980 | Population Density in 1980 | Annual Growth Rate 1969-80 | Sex Ratio in 1980 |
|---|---|---|---|---|---|
| 1. Central | 513,835 | 35.6% | 14.0/sqm. | 3.3% | 1.015 |
| 2. Copperbelt | 1,248,888 | 92.0 | 103.4 | 3.9 | 1.060 |
| 3. Eastern | 656,381 | 9.0 | 24.7 | 2.3 | 0.888 |
| 4. Luapula | 412,798 | 15.9 | 21.0 | 1.9 | 0.913 |
| 5. Lusaka | 693,878 | 83.5 | 82.2 | 6.3 | 1.048 |
| 6. Northern | 677,894 | 17.4 | 11.9 | 2.0 | 0.891 |
| 7. North-Western | 301,677 | 12.6 | 6.1 | 2.4 | 0.913 |
| 8. Southern | 686,469 | 27.1 | 20.8 | 3.0 | 0.968 |
| 9. Western | 487,988 | 12.8 | 9.9 | 1.6 | 0.837 |
| *Large Urban Areas (LUA's)* | | | | | |
| 10. Chililabombwe | 61,928 | — | — | 3.0 | 1.060 |
| 11. Chingola | 145,869 | — | — | 3.2 | 1.059 |
| 12. Kabwe | 143,635 | — | — | 7.3 | 1.042 |
| 13. Kalulushi | 59,213 | — | — | 5.7 | 1.051 |
| 14. Kitwe | 314,794 | — | — | 4.2 | 1.071 |
| 15. Livingstone | 71,987 | — | — | 4.3 | 1.057 |
| 16. Luanshya | 132,164 | — | — | 2.9 | 1.081 |
| 17. Lusaka | 538,469 | — | — | 6.8 | 1.055 |
| 18. Mufulira | 149,778 | — | — | 3.0 | 1.057 |
| 19. Ndola | 282,439 | — | — | 5.3 | 1.069 |
| Total | 5,679,808 | 43.0 | 19.5 | 3.1 | 0.962 |

Source: Central Statistical Office, 1980 Census of Population and Housing.

recognized tribes. Together, they speak about 40 different dialects, all of the Bantu-language group. Although English is the official language, it is limited mostly to formal use. The 7 major tribal languages--Bemba (spoken by 19 percent of the population), Nyanja (also called Chewa, 11 percent), Tonga (11 percent), Lozi (6 percent), Kaonde (3 percent), Lunda (3 percent), and Luvale (2 percent)--are used in addition to English for radio broadcasts and other official purposes. Some of these languages, especially Nyanja (indigenous to Eastern Province) and Bemba (Northern Province) have spread as a result of internal migration and are now widely spoken outside their indigenous areas. The dominant tribal group--the Bemba--control Zambia's influential mineworkers' unions.

Apart from the indigenous population, there are about 67,000 residents of European descent, especially in Copperbelt Province where the mines still depend on some 4,000 highly skilled foreign professionals. In addition, there are roughly 16,000 Asians, mostly Indians, and about 7,000 persons of mixed descent. The major groups of foreign nationals, in order of importance, are the Malawians, Zimbabwans, British, and Tanzanians. About 20 percent of the population is Roman Catholic and 10 percent Protestant. The cultural importance of Christianity, however, exceeds its numerical weight. The remainder of the population adheres to traditional tribal religions.

## EDUCATION AND HEALTH

Zambia now apportions over 15 percent of its national budget to education. Since independence, school enrollment and literacy rates have improved dramatically. But, despite government efforts, the literacy rate still hovers around 50 percent.

In 1981, Zambia's 3,017 primary and secondary schools educated about 1.2 million students. Primary school enrollment increased from 53 percent of all children aged 7 to 13 in 1965 to 96 percent in 1980. At the secondary level, about 16 percent of the 14-to-18 age group was enrolled in 1980, up from 7 percent in 1963. Nearly twice as many men as women are enrolled in secondary school. In 1985, 22 percent of 12-to-17-year-old males were enrolled in school compared to 12 percent of females in the same age group.

Education up to the secondary school level is free, but the expenses incurred for uniforms and travel are serious obstacles for many families. Due to their relatively small number, about half of all secondary schools are boarding schools.

At the college level, enrollment rates drop to 2 percent even though Zambians view higher education not only as a gateway to white-collar employment but as an enhancement of personal status. The country's only university, the University of Zambia, is located in Lusaka, with additional campuses in Ndola and Solwezi. In 1982, its total enrollment was 4,088 students. Tuition varies from $125 to $1000 a year depending on the department and the student's nationality.

Despite some noticeable progress, the public health structure is still deficient. Principal health problems include malaria, tuberculosis, and, in Northern Province and Luapula Province,

sleeping sickness and river blindness. Between 1965 and 1980, health services improved greatly with a decline of persons per physician from 11,390 to 7,670 (compared to 520 in the U.S.) and persons per nurse from 5,820 to 1,730 (compared to 140 in the U.S.). In 1977, each of Zambia's 82 hospitals (with up to 200 beds) was in most cases headed by a single physician and often run by a missionary organization. In addition, there were 1,004 health centers (with up to 20 beds) headed by medical assistants. Major cities have larger facilities, sometimes comparing favorably with European hospitals.

Zambia's lack of physicians poses an ongoing problem. At present, 80 percent of Zambia's doctors are foreigners, many of whom are leaving due to deteriorating salaries. Between 1983 and 1984 their numbers declined sharply from 686 to 487. Dentistry is practically nonexistent, with fewer than 100 dentists for the entire population.

Although health services are scarce, medical treatment is free for those who cannot afford to pay. In many cases, traditional remedies supplement modern medical treatment. In rural areas, women use midwives, rather than giving birth in health centers, largely from choice but also as a function of distance. One-third of rural Zambia lives more than 10 miles from a health center.

### ECONOMY, LABOR FORCE, AND INCOME

With a per capita GNP of $580 (1983), Zambia belongs to the richest half of African nations. However, since independence, its position has deteriorated largely as a result of weakening world prices for copper. The 60 percent decline in the per capita GNP since 1974 has caused a substantial increase in the foreign debt, despite the more than 50 percent cut in imports between 1973 and 1983. In 1983, Zambia owed $2.6 billion to foreign banks, or 84 percent of its 1983 GNP.

About two-thirds of Zambia's labor force, an estimated 2.2 million persons in 1982, still work in agriculture. Despite a growth rate of nearly 10 percent in 1984, the productivity of this sector is quite low. Agriculture still accounts for only 15 percent of the GNP, making it one of the lowest percentages anywhere in Africa. Agriculture remains largely underdeveloped while copper supports the economy and the government keeps food prices artificially low to assuage wage demands of urban workers.

In 1979, half of Zambia's commercial food production was controlled by about 1,000 wealthy

## TIPS ON TRENDS

### "Town within a town" concept boosts Japanese department-store sales

Look for a department store in Japan and you may find a town. Vast shopping centers, or "lifestyle playgrounds" as the Japanese call them, are Japan's latest answer to the slumping sales in the department-store industry.

Several of Japan's department-store conglomerates have opened "towns within towns" which incorporate numerous facilities for the general public such as churches, museums, banks, and sports clubs clustered around a major department store. So far, the new concept seems to be working. Seibu Saison Group's "Tsukashin Town," with Seibu Department Store at its center, draws an estimated 30,000 to 40,000 customers a day on weekdays and up to 70,000 on holidays. Sogo Group's "Minato Mirai 21," developed in conjunction with Yokohama redevelopment authorities, places the Yokohama Sogo Department Store at the heart of Yokohama's highly successful shopping-zone redevelopment project.

### Japan's "silver-market" alive and kicking

Catering to Japan's "Silver Generation" is becoming big business. Nearly 15 percent of Japan's total population is now over 60 years of age. Only 15 years from now, one out of every four persons in Japan will be a senior citizen.

Japanese firms offering health-care services, luxury travel tours, and financial management services are beginning to boom, and there's no end in sight. The $130 billion spent by the over-60 set in 1983 is expected to reach $800 billion by the year 2000.

Innovative new firms like Japan's Teishoku Company offer a "calorie-control service" delivering food items pegged to the customer's particular diet. Deliveries for diabetics and those with high blood pressure are in particular demand. Established businesses too are adding special services to meet the needs of Japan's affluent seniors. For only $133 a year, the Toyo Trust Bank offers unlimited financial consultations to seniors looking to invest their capital. According to the Statistics Bureau of Japan's Management and Coordination Agency, Toyo is on the right track. The average savings of a silver-generation household in 1984 was about $65,000, nearly 60 percent more than that of the average Japanese household.

American firms have already jumped in. Beverly Enterprise of California in conjunction with Japan's Shimizu Construction Company plan to offer a consultancy service for the care of the elderly. Manor Care of Maryland is now conducting market research in Japan.

The never-far-behind Japanese government already has set up a "Silver" Service Promotion and Guidance Unit in its Ministry of Health and Welfare specifically to promote participation by the private sector in developing services for the elderly.

### West Germans spend record sum on research

West German business spent about $12 billion in 1985, up from $10 billion in 1984. This record sum was further augmented by the nearly $17 billion spent by universities and research institutes. West Germany's total expenditure on research was nearly 3 percent of its gross national product–close to the proportion of the gross national product spent individually by Japan and the U.S. Dollar for dollar, however, the U.S. spent six times as much as the Federal Republic. Japan spent twice as much.

farmers--mostly of European descent--who own most of the "Crownland," or the fertile stretches of land along the central railroad. Another 30,000 "emergent farmers" produce cash crops, whereas the remaining 600,000 "peasant farmers" consume most of what they produce. About 43 percent of all farms have fewer than 2.5 acres.

Despite the more than $20 million invested in agricultural development projects since 1975, per capita food production decreased by 26 percent in the last two decades largely because production could not keep up with burgeoning population growth. Total production grew 1.4 percent annually between 1973 and 1983 while Zambia's population growth sped along at 3.1 percent annually. Cooperatives formed in the mid-1970s to supplement large commercial farms and reduce food imports were barely self-sufficient by the late 1970s. In 1979, they suffered severe crop failures which led to massive food shortages. As a result, cereal imports and food aid in cereals increased from a total of 94,000 metric tons in 1974 to 330,000 in 1983. Zambia now imports 25 percent of its food.

The growth of the manufacturing sector, which now employs about 11 percent of the working population and accounts for 18 percent of the GNP, has been slightly faster (2.5 percent annually) but still less than population growth. Most of Zambia's industrial production is for local use. Trade and industry are for the most part under the wing of the Zambia Industrial and Mining Corporation (ZIMCO), a holding of the Industrial Development Corporation (INDECO)--the largest corporation in independent Africa. After the Mulungushi Reform of 1968, INDECO gained a majority interest in about one-third of Zambia's major industries and control of Zambia's insurance and construction companies. Commerce, transportation, and the service sector absorb the remaining 22 percent of the working population.

Although women make up 32 percent of the labor force, female labor force participation is lower in Zambia than in many West African and East African coastal countries where women work in local markets selling produce. Zambia lacks a local-market tradition.

Urban wages in Zambia are higher than in surrounding countries mainly due to the relative prosperity of the copper industry. However, stagnating growth in the urban job market turns many qualified new entrants away--the 375,000 new jobs available in 1980 were about the same number available 10 years prior. Consequently, Zambia's income distribution is one of the most unequal in the world. In 1976, the poorest 60 percent of the population accounted for only 22 percent of total income; the top 10 percent of the population, 46 percent of total income.

COMPARATIVELY SPEAKING

***In 1985, Zambia's per capita GNP was $580, compared to an average of $300 for all of Eastern Africa.***

Illustration by Diana Souza

COMPARATIVELY SPEAKING

### CONSUMPTION, TRANSPORT, AND COMMUNICATION

The typical Zambian diet consists of a maize porridge with vegetables and fried fish. Beef is a part of the daily diet in cattle-raising country--Western, Southern, and Eastern Provinces. Traditionally, Zambians eat only two meals a day--between 10 a.m. and 11 a.m. and between 4 p.m. and 5 p.m.-- supplemented by snacking on fruits, nuts, roasted manioc, or sugarcane while working in the fields. The local beer, a brew derived from millet, provides supplemental minerals and vitamins. Tradition, however, prohibits pregnant women from drinking beer or eating eggs. In 1982, the mean daily calorie intake was only 2,054 calories, 11 percent below the level recommended by the World Bank.

Urban Zambians take pride in what is considered "smart dress"--a Western-style jacket, shirt, and tie for men, and a modern dress covering the knees for women. Once worn by expatriates or wealthy Zambians, second-hand Western clothes are sold to the less fortunate. Western clothes are so highly valued that in the more remote regions they are preferred over money as a means of exchange. The traditional bark-cloth, similar to felt, has almost disappeared.

Because Zambia lacks a local-market tradition, markets are only found in the largest cities and district capitals. Sometimes a "European" market coexists with an "African" market and sells local foodstuffs, such as mango, papaya, guava, oranges, bananas, tomatoes, beans, ground nuts, corn, eggplant, onions, and potatoes, next to imported clothes, transistor radios, watches, and kitchen utensils. The "African" markets tend to sell a larger variety of food and consumer articles of generally lower quality.

Although per capita energy consumption in Zambia is only 6.1 percent of what it is in the United States, Zambians use somewhat

more than most of their African neighbors. Moreover, energy is one of the few economic sectors where the growth of production has exceeded the growth of consumption in recent years (6.4 percent versus 1.9 percent annually between 1973 and 1983). Zambia now even exports energy to Zaire and Zimbabwe. However, Zambia still relies heavily on imported oil, which went from 10 percent of total import value in 1973 to 19 percent in 1983.

Zambia's 806 miles of railroads are of vital importance to the country. The Tanzam Railway, built with assistance from the People's Republic of China and completed in 1975, alleviated some of Zambia's transportation problems but fell short of expected goals due to a lack of spare parts and maintenance, financial problems, limited harbor capacity at Dar-es-Salaam, and bomb attacks by Southern Rhodesian terrorists. The Tanzam Railway, which runs from the small town of Napiri Mpolshi along the old colonial line of rail to the port of Dar-es-Salaam, is due to have a second track added to further ease the flow of traffic.

Zambia's roughly 23,000 miles of roads service 135,000 motor vehicles, of which 67,500 were private cars in 1981. Normally, any part of the country can be reached from Lusaka within a day. The most important roads are the Great North Road, running from Livingstone via Lusaka and Mpika to Turduma on the Tanzanian border; the Great East Road, running from Lusaka to Chipata and the Malawian Border; and the Zairean Border Road, running from Kapir Mposhi to Lumumbashi in Zaire. These roads and the ones to Mongu in the west and Mpulengu in the north are tarred. The 20,000 miles of rural access roads, or "dirt roads," are virtually inaccessible in the rainy season.

Mail and bus services are considered reasonable by African standards. Long distance public transportation is by bus. Within the cities, wealthy Zambians own cars, but the majority of the population simply walks or hitchhikes. Truck drivers often reduce travel costs by letting paying hitchhikers sit in the back of their trucks. The Zambia Airways Corporation, run by Alitalia until 1976, now provides internal as well as international air services, including a nonstop flight from Lusaka to London.

In 1984, Zambia had an estimated 1 million radios and nearly a quarter million television sets. The five radio and two television stations broadcast 60 percent of the time in the 7 major tribal languages. There were 77,400 telephones in 1979.

The two major newspapers--the *Zambia Daily*, published by the government in Lusaka, and the *Times of Zambia*, the UNIP newspaper published in Ndola--together have a circulation of 20 copies per 1,000 inhabitants. The Zambia Information Service distributes provincial newspapers in such tribal languages as Nyanja. Other printed media include journals such as *The Miner*, *Roan Antilope*, *Zambia Farmer*, *Livingstone Mail*, and *The Sunday Times*.

**SOURCES OF INFORMATION**

Reports from the 1980 census can be obtained from the Central Statistics Office of Zambia, POB 31908, Lusaka. This agency also publishes other statistical reports at irregular intervals. A quite comprehensive but somewhat outdated analysis of Zambia's population, *The Population of Zambia*, by Patrick O. Ohadike and Habtemariam Tesfaghiorghis, was published in 1975 in the CICRED Monograph Series. Other works of general interest include A. Roberts' *A History of Zambia* (London, 1976), A. Turok's *Development in Zambia* (London, 1979), and the classic *Zambia* by Richard Hall, published in 1965 by the Pall Mall Press, also in London. Another useful source of information is the Third National Development Plan (1979-83), published in Lusaka in 1979.

Articles on specific issues relevant to Zambia can be found in *The Zambian Journal of Contemporary Issues* and *The Quarterly Economic Review of Zambia*. In addition, *The African International Business, Economic and Political Monthly*, 54 A Tottenham Court Road, London W1 WI P OBT, regularly provides up-to-date information on Zambia and other African countries. The ILO issued a report on Zambia in 1981, entitled "Zambia: basic needs in an economy under pressure," published in Addis Ababa. A comparison between the industrial policies of Kenya, Tanzania, and Zambia was the object of a World Bank Study published in 1981 as World Bank Staff Paper no. 457.

Other data can be found in various handbooks, such as the *UN Demographic Yearbook*, the World Bank's annual *World Development Report*, and the annual *Africa South of the Sahara*, published by Europa Publishing, Ltd. in London. World Bank publications can be obtained from The World Bank, 1818 H Street, N.W., Washington, DC 20433. •

*--Ralph Hakkert and Roel Wieringa*

*Ralph Hakkert is a demographer and an* International Demographics *correspondent. Roel Wieringa is a computer scientist who spent two years teaching mathematics at a Zambian secondary school.*

## CONFERENCES

The 41st annual Cleveland World Trade Conference will be held on May 22. The theme of the conference is "Strategies for Global Survival."

Four concurrent morning sessions will follow the keynote address. The four morning seminars are entitled: the mystery of international trade made easy; international marketing--fighting back will work; technology--reinventing corporate technology; and keeping tabs on global competition.

The four concurrent afternoon sessions are entitled: focus on regional and country areas--intelligence work pays off; creative marketing tactics; new horizons and case studies in technology; and advanced variations in international trade.

For more information and registration materials, contact the Cleveland World Trade Association, 690 Huntington Building, Cleveland, Ohio 44115; telephone (216) 621-3300. •

# REGIONS

## EUROPE

### West Germany

Experts are beginning to wonder how low can it go. The French demography journal, *Population*, reports that the West German total fertility rate fell to 1.27 children per woman in 1984, down from an already low 1.32 children per woman in 1983.

### Italy

As did school children in most member states of the European Community, the number of school children in Italy continued to decrease in the 1983-84 school year due to the fall in the birthrate.

Kindergarten and preschool class enrollment fell 4.5 percent, primary school enrollment by 3.5 percent, and *scuola media* (an intermediate three-year phase that follows the primary stage) enrollment by 1.4 percent.

School enrollment in Secondary Level 1, however, increased by 1.7 percent, largely due to students remaining in school to take short vocational training courses. Vocational courses offer prospective job seekers added credentials for the difficult-to-enter Italian job market.

Italy's job market for young people is brutally competitive. Seventy-six percent of those seeking work in 1985 (1.7 million people) were between the ages of 14 and 29. It takes an average of 15 months to find work. Over half of all unemployed Italians are youths between 14 and 29, 90 percent of whom are trying to find work for the first time.

## SOUTH AMERICA

### Brazil

Brazil's progress in accepting family planning has led to a reduction in the population growth rate from 3 percent annually between 1955 and 1965 to 2.3 percent in 1985. Although Brazil has no national population program, state and local government programs have been highly successful, especially with Brazil's educated classes. The strong support of the private sector--physicians, pharmacists, and the private family planning organization Sociedade Civil de Bem-Estar Familiar No Brasil (BEMFAM)--is an important factor in Brazil's success.

Of those practising family planning in 1980--mostly Brazil's middle and upper classes--42 percent chose the pill, 38 percent used voluntary sterilization, 12 percent coitus interruptus, and 8 percent natural methods. The challenge of spreading family planning practice to Brazil's vast city slums and large rural areas lies ahead.

Some inroads have already been made. In 1979, BEMFAM found that even in the poor northeast state of Piaui, 31 percent of women were practising family planning. In addition, Gallup surveys of public opinion show increased interest in slowing population growth. Seventy-one percent of those polled in 1981 thought that fewer children should be born, up from 46 percent in 1967. And 82 percent of those polled in Sao Paulo thought 2 to 3 children was an ideal number, up from 68 percent in 1972.

Two other factors add hope to Brazil's fight to slow its population growth--the prevalence of media access and of contraceptives themselves. A large proportion of Brazil's population has access to the media and therefore to family planning broadcasts. As early as 1976, 76 percent of homes had radios and 47 percent had TVs. Even in the poor northeast, 52 percent had radios. Not surprisingly, considering that Brazil is the world's fourth largest producer of contraceptives, contraceptive prevalence surveys in Brazil show an unusually high prevalence rate of 61 percent.

## MIDDLE EAST

### Turkey

Unwanted pregnancies are a growing problem in Turkey. The percentage of married women below age 45 who have undergone at least one abortion has increased from 8 percent in 1963 to 20 percent today.

Each year an estimated 500,000 Turkish women obtain legal abortions. A 1983 law legalized abortion. However, Turkish authorities do not view abortion as an alternative to contraception and are expanding family planning services. By 1981, 4 million people had already been educated in family planning methods •

# PUBLICATIONS

**Postcensal Annual Estimates of Population by Marital Status, Age, Sex and Components of Growth for Canada and the Provinces,** June 1, 1985, vol. 3. Ottawa: Statistics Canada, 1986, 102 pp., $22.00 in Canada; $23.00 elsewhere. Order from Statistics Canada, Publications Sales and Services, Ottawa K1A OT6, Canada. For credit card orders, call (613) 973-8018.

The June 3 census is unlikely to produce any surprises because Canadian statisticians are so good at producing fresh estimates each year. This volume, for example, explains what happened to Canada's population growth between 1984 and 1985 and how age distribution, marital status, immigration, and emigration have changed.

Canada's population continues to age. The group aged 0 to 17 has decreased slightly from 26.3 percent of the population in 1984 to 26 percent in 1985, while the adult and elderly age groups have increased by about .1 percentage points each.

**China Urban Statistics 1985,** compiled by State Statistical Bureau, People's Republic of China, London: Longman Group and China Statistical Information and Consultancy Service Centre, 1985 703 pp., $120. Order from Gale Research Company, Book Tower, Detroit, MI 48226; telephone (313) 961-2242.

By the end of 1984, China had about 300 cities serving as political, economic, and cultural centers. Many are now working out a strategy of economic development with plans that include opening their doors to the outside world.

Information about China's cities is given in three sections in this first edition of *China Urban Statistics*. The first section provides general information about China's inland cities with populations of more than 1 million, coastal ports, special economic zones, and Hainan Island. Textual information is provided on each city's geography, history, economic development, urban development, social development, places of interest, and development prospects.

The second section is a statistical survey with data from 295 cities. Included are the names and populations of cities and counties, proportion urban and rural, population density by county and city. For each city and county, there is also information on such items as the number of telephones, the number of post offices, number and enrollment of schools at various levels, the number of theaters, cinemas, libraries and books in libraries, the number of clinics and hospitals, the number of people engaged in various occupations including retailing, catering, tourism, agriculture, and the floor space of residential buildings. Information is also given on public utilities and government expenditures on specific functions.

The third section is an appendix with information on weights and measures and a glossary of city names in English and Chinese.

**Estimates and Projections of Urban, Rural and City Populations, 1950-2025: The 1982 Assessment,** 1985, New York: The United Nations, 148 pp. Order from Publications Sales, United Nations, New York, NY 10017.

A prime question for any overseas market researcher is what cities should be the focus of attention. This publication gives guidance on the size of cities and how large they are likely to become. This publication analyzes urban growth throughout the world and projects how urbanized each country will become in the next 40 years. Also provided are projections for the 35 largest cities in the world from now until 2000. A discussion of these new projections was published in *International Demographics* in March 1985.

**Statistical Indicators on Youth,** 1985, New York: United Nations, $15.50. Available in English and French. Order from Publications Sales, United Nations, New York, NY 10017.

This statistical reference book presents 41 indicators on youth for 172 countries and areas in a pocketbook format, with accompanying notes on statistical methods and sources. The indicators are in the fields of population, education and literacy, labor force and agriculture, marital statistics, fertility, life expectancy, and causes of death. The compilation is based on a microcomputer data base and was prepared with financial support from Soka Gakkai, a nonprofit organization in Japan. A wall chart summarizing this volume is also available from the same address for $3.00.

**World Health Statistics Annual,** 1985, Geneva, Switzerland: World Health Organization, 519 pps., 85 Sw. Fr. Order from WHO Publications Center USA, 49 Sheridan Avenue, Albany, NY 12210.

If you need country-by-country data on causes of death for infants or adults, or on the state of water and sanitation, this volume is for you. There are also country-by-country vital statistics and life tables that provide data on life expectancy, number of survivors, and chances per 1,000 of death from specific causes.

## COMING UP

**The Ottawa-Hull Metropolitan Area:** As Canada's capital, Ottawa's main business is government.

**Do's and don'ts of multilingual copy adaption.**

FEATURE

# Gray Australians Overlooked by Marketers

Surfers are not alone when it comes to partaking of the fabled good life in Australia. A recent study of Australia's aged contradicts the widely held view among younger Australians that senior citizens are a drain on the nation's social services and economy in general.

Rather, a 1985 survey of Australians 50-years-old and above, the Grey Growth Survey, found participants in generally good health and active, with equal or higher financial status and higher per capita disposable income than the national average, and with good self-images and positive attitudes towards their lifestyles below the equator.

What's more, marketers of consumer goods and services have largely ignored this potentially lucrative and expanding aged market. The Australian Bureau of Statistics projects a 1986 population of 2.2 million 50-to-64-year-olds and 1.9 million over-65-year-olds. One in four Australians now fall in the 50-and-over category. One in eight Australians is over 65. Those 50 and above in Australia spend more than $9 billion annually on goods and services.

As in other developed countries, the portion of the population aged 50 and over in Australia is expected to continue expanding as the substantial numbers of baby boomers move into the upper-age categories , the number of births decline, and life expectancy improves as a result of the falling death rate. Substantial levels of immigration, however, have had the effect of reducing the proportion of the population in elderly groups to levels below what it would otherwise have been.

The Grey Growth Survey found that of those aged 50 to 64, more than 30 percent have incomes of at least $18,000, compared with Australia's average household income in 1985 of $20,500. However, only 4 percent of retired persons over 50 have incomes of more than $18,000.

Those in the 50-to-64-year-old age group are more inclined to purchase nonessential and luxury goods than those in the over-65 group as most are still in the workforce and therefore have larger incomes than those over 65, most of whom are retired.

However, as a total group, those over 50 have higher disposable incomes proportionately than other age groups. Over 68 percent of the over 50s own their own home outright with 78 percent living in single detached houses. Freed of mortgage payments and support of dependents, Australia's aged have more discretionary income at their disposal than their younger counterparts.

In 1985, 50-to-64-year-olds most often purchased home furnishings, cars, microwave ovens, and VCRs. For those over 65, home appliances such as air conditioners, refrigerators, washing machines, and clothers dryers were popular purchases. An estimated $3 billion was spent by over-50 Australians on consumer durables alone in 1985.

The Grey Growth Survey also found that contrary to the prevailing picture of those over 50, more than 85 percent of the over-50 set lead totally independent lives.

The fiscal and physical well-being of the post-50 set is reflected in a widespread trend toward early retirement. About 70,000 Australians retire each year. Nearly half of Australia's population above 45 has left the work force according to recent government figures. Australia's retirement age is 65 for men and 60 for women. Forty-four percent of Grey Growth participants had reached retirement age. A full third of all retirees had retired before they reached 60.

Retirees who participated in the Grey Growth Survey described themselves as useful, content, active, free, doing their own thing, and generous. Australia's aged tend to be very sociable. Seventy-seven percent of Grey Growth participants were members of at least one sport, service, or social club, and 50 percent of people over 65 were members of two or more clubs or organizations. The most popular sport clubs included those offering bowling or golfing, followed by those providing walking, fishing, or cycling, and outdoor racquet sports. Grey Australians also make good use of public facilities and services as libraries, parks, recreation areas, and educational courses.

Older Australians may still be up and around, but market researchers have largely acted as if this group was already asleep. Research data on the older consumer in Australia is sorely lacking, according to Tony Hardingham, director of Jordan Hardingham, Pty., Ltd., the agency that commissioned the Grey Growth Survey.

Grey Growth was based on nearly 1,000 householder interviews of persons above 50 living in the state capitals of Sydney, Melbourne, Brisbane, Adelaide, and Perth. It contains a 60-page analysis of survey findings and 350 pages of tables. Copies can be obtained for $900 from Jordan Hardingham, Pty., Ltd., Riley House, 164a Campbell St., Surry Hills, NSW, 2010, Australia; telephone (02) 211-2144; fax (02) 211-4531. *--Peter Inserra*

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